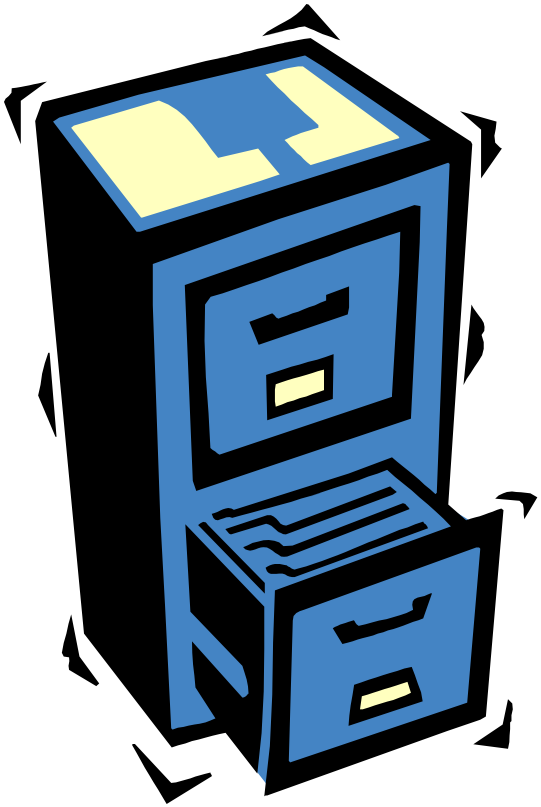
Operations Support Branch



PKXO SERVICES

JOHN CALLAHAN
CHIEF, OPERATIONS SUPPORT BRANCH

Operations Support Branch

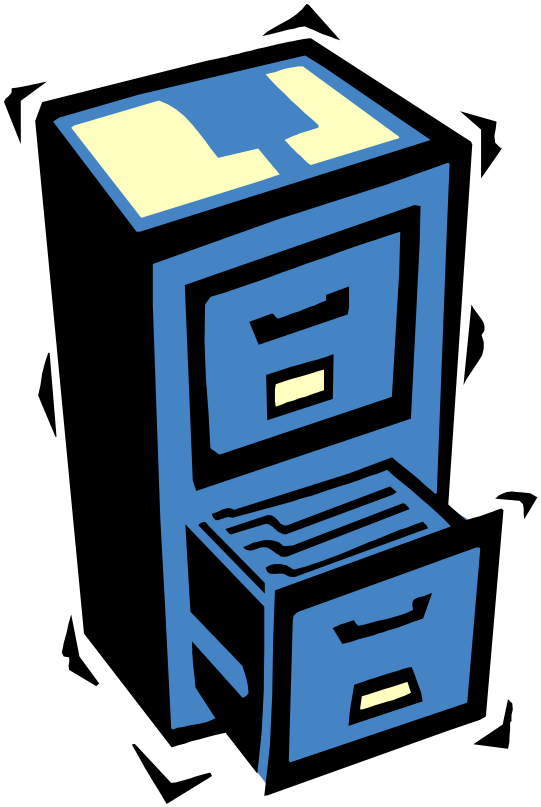
What We Do

- SCANNING/COPYING
- CAGE CODES
- CLEARANCES/DATA
- J018/JO41 CODING
- DISTRIBUTION (Paper)
- FILEROOM
- FILE CLOSEOUT
- PK MAIL

Operations Support Branch

- **Distribution Personnel**
  - **Enter documents into database, AND sends files to the fileroom or to staging area to wait for scanning**
- **Fileroom Personnel**
  - **Catalogs files in Relativity Records Manager (R2M)**
  - **When buyer requests file be returned after distribution**
    - **Enters charge-outs into the R2M Fileroom data base, AND**
    - **Places files in division pick-up bins**
  - **For files to be stored in Centralized Fileroom in PKXO**
    - **Responsible for maintaining these files**
    - **Responsible for filing post award documents in correct file folders**
    - **Checks for and processes requests for files**

Operations Support Branch

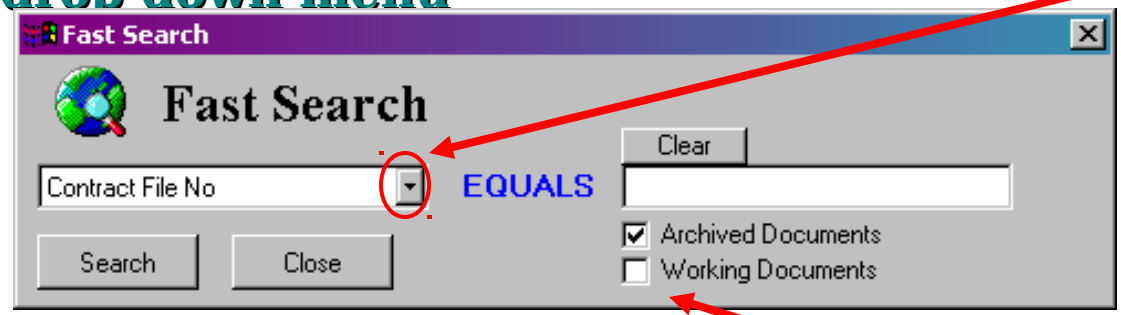


HOW TO ORDER A FILE

Fast" Search

1. Quick search for only a single "Search Field"/criteria

2. Default is "Contract File No" but may select others from drop down menu



3. "*" is wild card search character
   i.e. *00-G-0001* or f09603-99-g-0002*

New Feature allows you to search entire database

- Search function is not case sensitive but
- "-" dash(es) must be typed in where appropriate (see sample above)

Be as specific as possible as extremely broad searches may cause problems!

4. Click "Search" button to activate search function

"Complex" Search

1. Select "Search Field" from Menu
2. May choose another search application

Default → Equals To

Not Equals To

Greater Than

Less Than

Contains → Contains

is like putting an "*" before and after entry

Enter the "Value to Find" - ???

Click arrow to obtain list of values

"*" is wild card search character

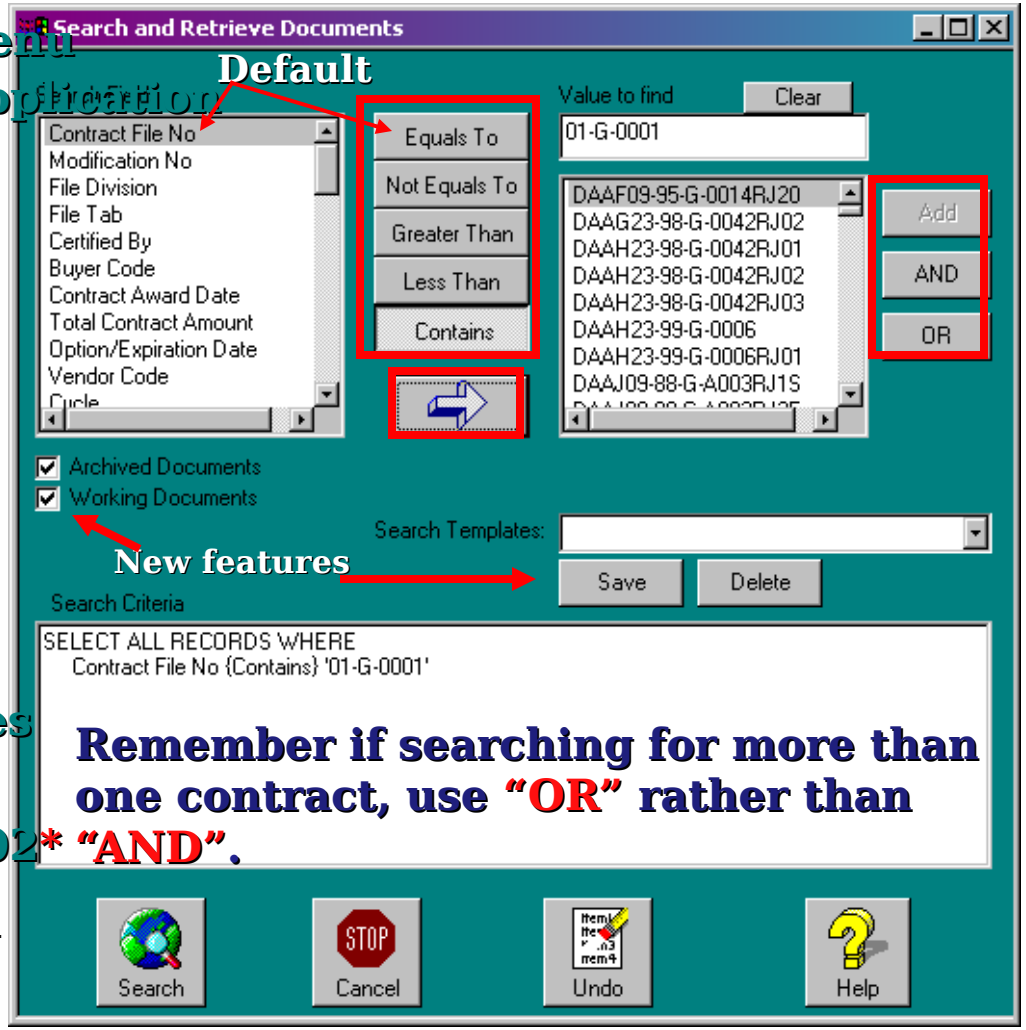
i.e. *00-G* or f09603-99-d-0002*

"-" dash(es) must be typed

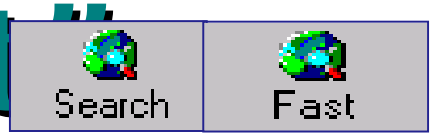
Click "Add" for first value

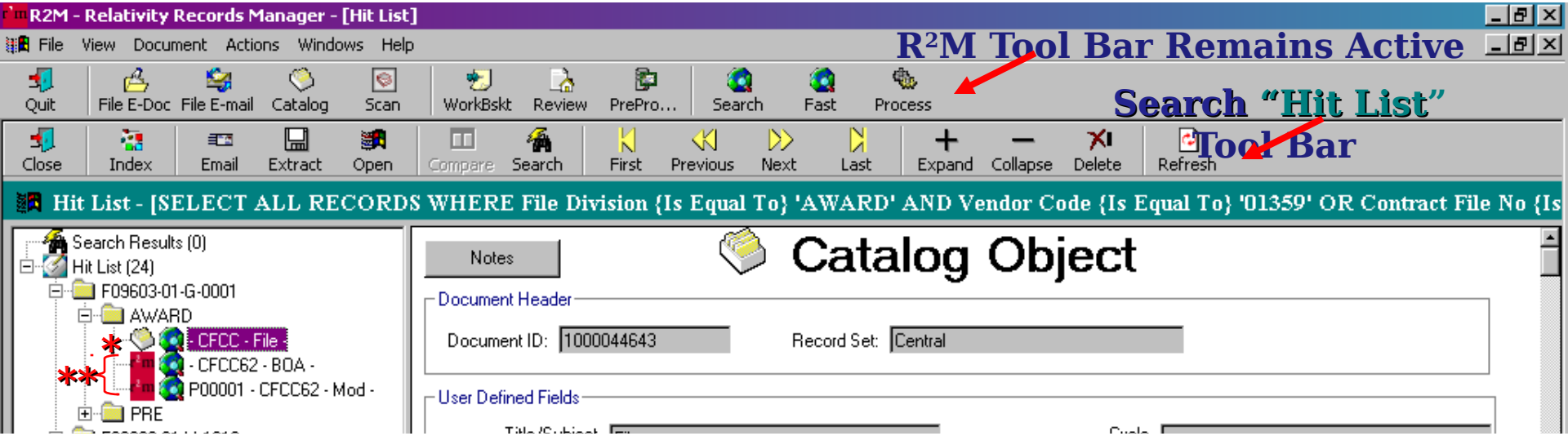
Click applicable "AND"/"OR" for additional search values selected

Note: "AND" narrows the search and "OR" broadens the search



r²m earch "Hit List"




R2M - Relativity Records Manager - [Hit List]
File View Document Actions Windows Help
R²M Tool Bar Remains Active
Quit File E-Doc File E-mail Catalog Scan WorkBskt Review PrePro... Search Fast Process
Search "Hit List" Tool Bar
Close Index Email Extract Open Compare Search First Previous Next Last Expand Collapse Delete Refresh
Hit List - [SELECT ALL RECORDS WHERE File Division {Is Equal To} 'AWARD' AND Vendor Code {Is Equal To} '01359' OR Contract File No {Is
Search Results (0)
Hit List (24)
F09603-01-G-0001
AWARD
CFCC - File -
- CFCC62 - BOA -
P00001 - CFCC62 - Mod -
PRE
Notes
Catalog Object
Document Header
Document ID: 1000044643
Record Set: Central
User Defined Fields

***Catalog Object (card file icon) has been created for our physical (paper) files**

****Electronic record's icon reflects its type, i.e. R²M icon is "Tif" R²M scanned document**

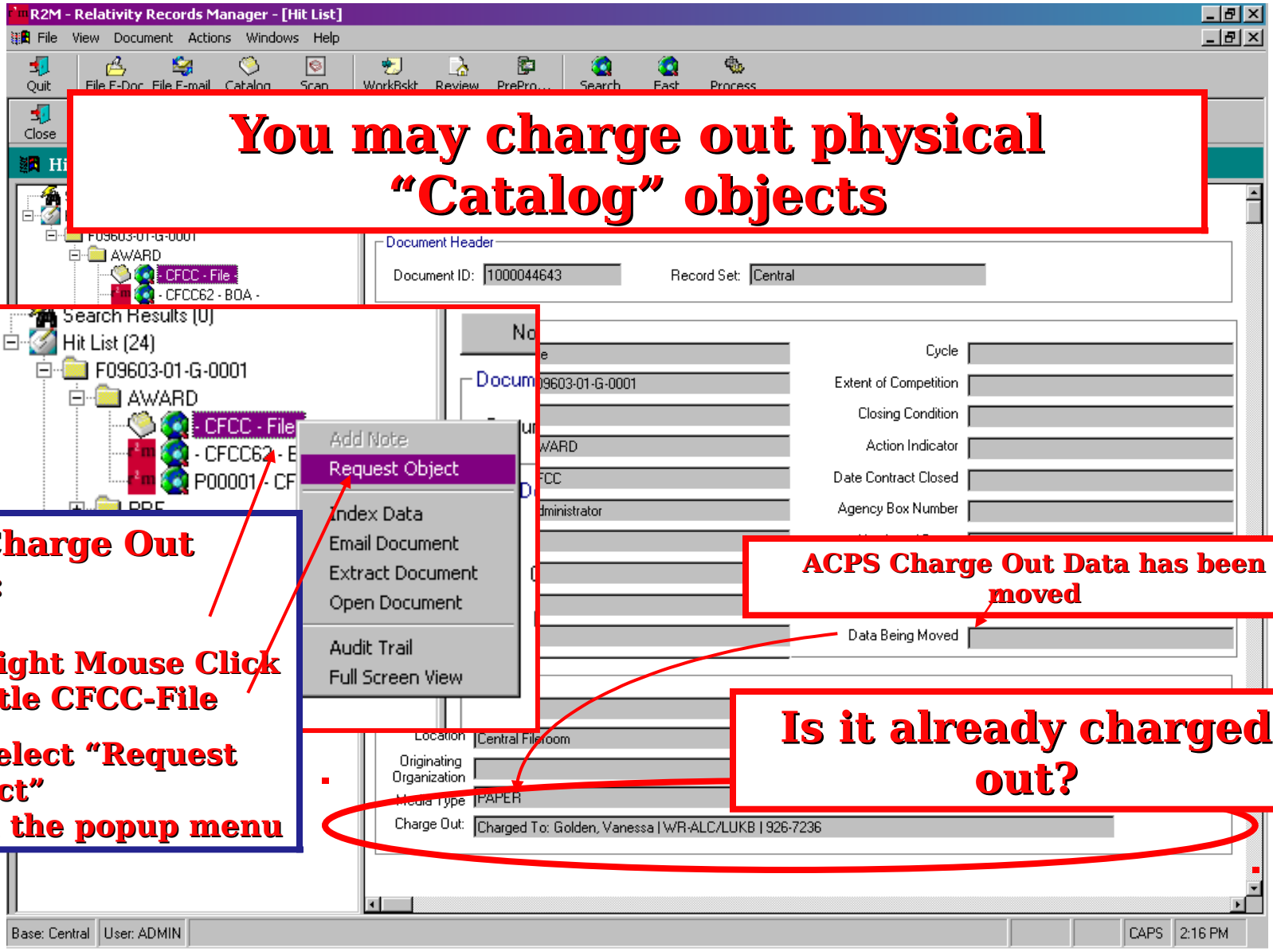
One click on document title listed at left pulls the document up for viewing in right viewing screen
Double click goes to full screen view of the document *(back door lower left closes full screen view)*

Archived records will reflect a Search icon next to the document type icon

Charge Out

Search | Fast

You may charge out physical "Catalog" objects



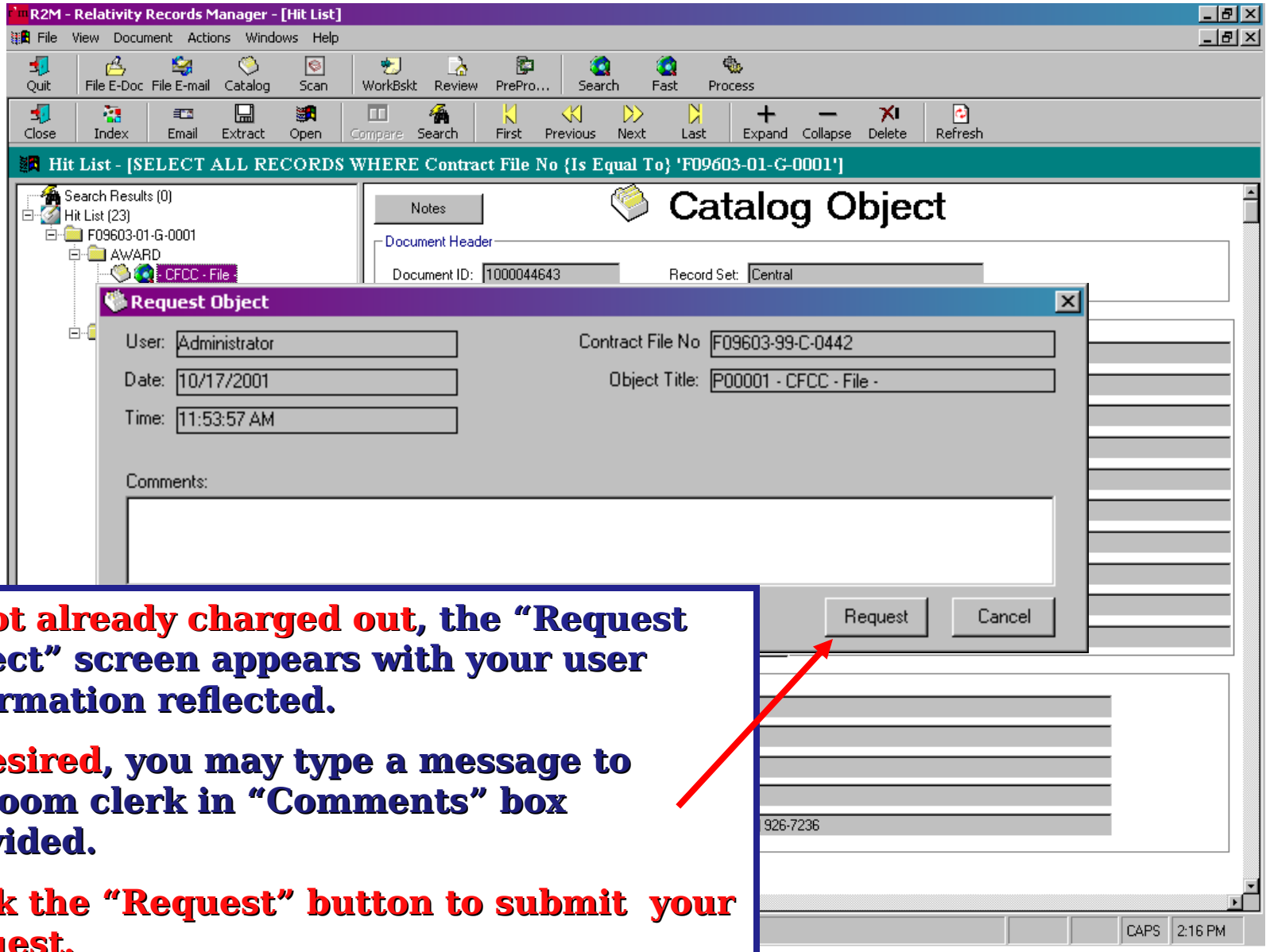
To Charge Out File:

1. **Right Mouse Click on title CFCC-File**
2. **Select "Request Object" from the popup menu**

ACPS Charge Out Data has been moved

Is it already charged out?

Charge Out



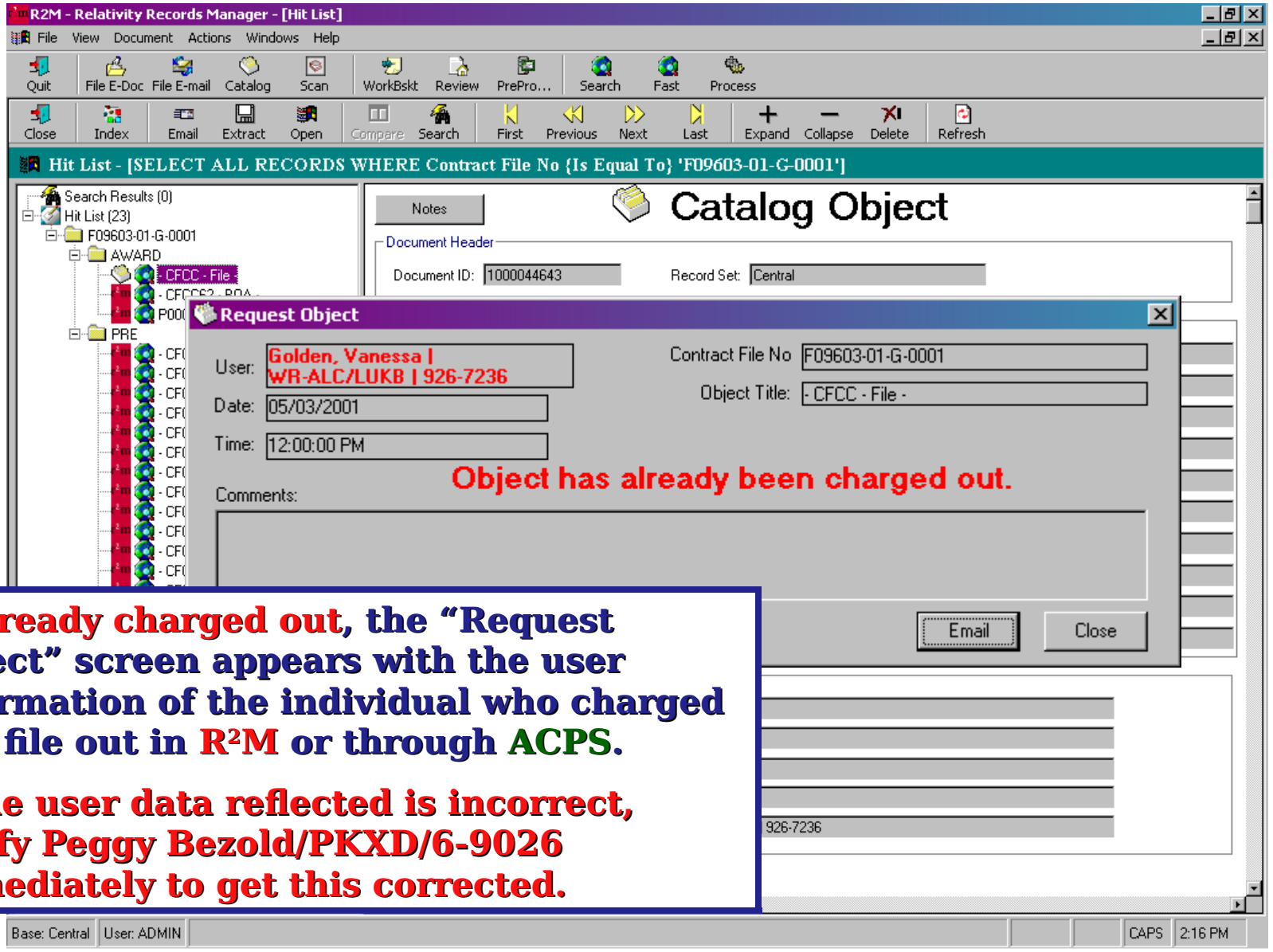
If not already charged out, the "Request Object" screen appears with your user information reflected.

If desired, you may type a message to fileroom clerk in "Comments" box provided.

Click the "Request" button to submit your request.

Charge Out

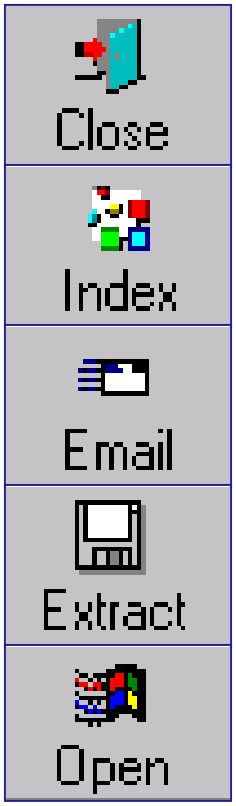
Search | Fast


R2M - Relativity Records Manager - [Hit List]
File View Document Actions Windows Help
Quit File E-Doc File E-mail Catalog Scan WorkBskt Review PrePro... Search Fast Process
Close Index Email Extract Open Compare Search First Previous Next Last Expand Collapse Delete Refresh
Hit List - [SELECT ALL RECORDS WHERE Contract File No {Is Equal To} 'F09603-01-G-0001']
Search Results (0)
Hit List (23)
F09603-01-G-0001
AWARD
- CFCC - File -
PRE
Notes
Catalog Object
Document Header
Document ID: 1000044643
Record Set: Central
Request Object
User: Golden, Vanessa | WR-ALC/LUKB | 926-7236
Date: 05/03/2001
Time: 12:00:00 PM
Contract File No F09603-01-G-0001
Object Title: - CFCC - File -
Object has already been charged out.
Comments:
Email
Close
926-7236
Base: Central
User: ADMIN
CAPS
2:16 PM

If already charged out, the "Request Object" screen appears with the user information of the individual who charged this file out in R²M or through ACPS.

If the user data reflected is incorrect, notify Peggy Bezold/PKXD/6-9026 immediately to get this corrected.

Search "Hit List" Icons



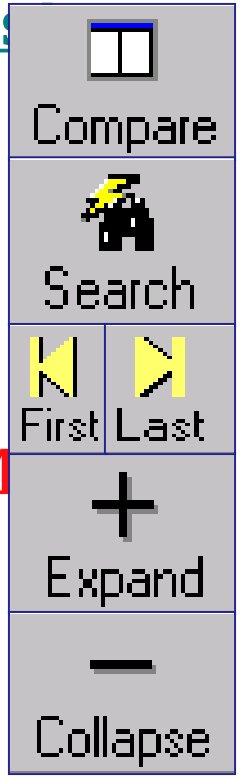
Close Search Hit Lis

view data entries

send document(s)

copy outside of R²M

launch original format



view in book style*

search by word(s)

flip thru documents

list at document level

list at folder level

Available At Hit List and Folder Levels but not at document leve

Helpful Tips

- ✓**Create all contract files in R2M. It will make your job easier**
- ✓**If you need a file from our fileroom please contact Teresa Roberts (R2M, Email, or phone at 6 6833 or 6 9093)**
- ✓**If you need a file that has been scanned into R2M and has been closed you can view it in R2M—Don't order it from the dungeon**
- ✓ **Don't place contracts for distribution in the file room**
- ✓**If you pull a file from a lektriever let someone in PKXO know that you have it**

Helpful Tips (Continued)

- ✓ **Don’t bring a paper file to the distribution desk for files that have been distributed electronically**
- ✓ **Be sure the MILSCAP copy of the contract has an effective date on it**
- ✓ **When requesting solicitation data packages (CD ROM) make sure the master bid set date is not more than 6 months old**

Helpful Tips (Continued)

- ✓**Verify email addresses on FL165 (Distribution Checklist)**
- ✓**When requesting security clearance letters make sure you provide Name, address, and Cage Code of the company**
- ✓**Be sure PR is in JO41 before you make award**

Operations Support Branch
PKXO